

Handing Off Contacts

COVID-19 Community Team Outreach

If you have to hand off monitoring efforts to another tracer, CCTO can help manage this process:

Option 1: Reassign Upcoming Tasks and Phone Calls

This is often the preferred option for contact tracers who will be out of office for a short period of time (<5 days). **Always check with your supervisor to determine your local processes.**

1. Check with your supervisor to discuss your out-of-office schedule and determine who will be monitoring your assigned contacts in your absence. **Once you discuss this with your supervisor, make sure you communicate this to the tracer who will be substituting for you.**
2. Ensure you have created tasks or phone calls (with due dates) for the upcoming outreach required to your contacts. See the [Timeline/Activities Job Aid](#) for help.
3. Navigate to the Activities Tab.
4. If needed, you can narrow your items by the "Due" filter to show only the items that are scheduled during the time you will be away.
5. Select the items that need to be reassigned using the checkmarks.
6. Click the "Assign" box.
7. Single click "Me" to produce the "User or Team" selection, and type the name of the assignee.
8. Click "Assign."

When the contact tracer covering your contacts navigates to their Activities Tab, each task, phone call, and appointment you have reassigned will be included in their list of activities.

1 Review with supervisor

2 Review upcoming items

3 Activities Tab

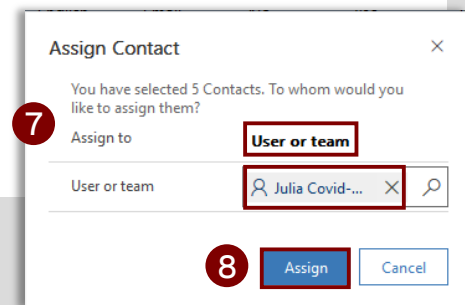
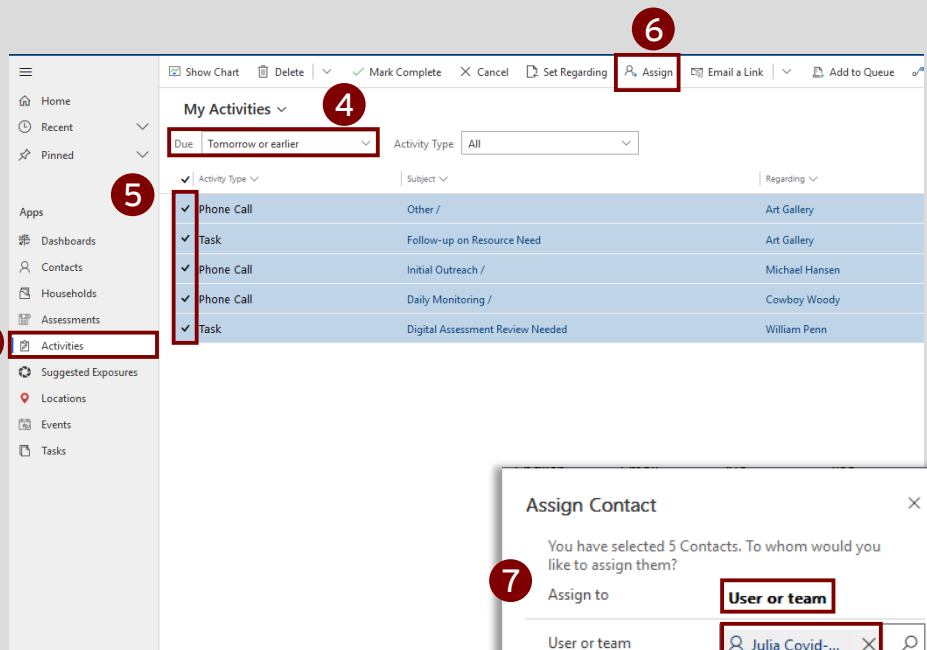
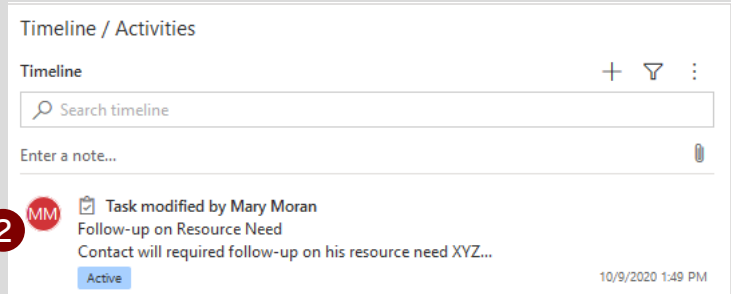
4 "Due" Filter

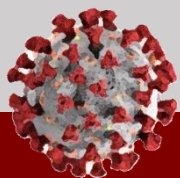
5 Select items

6 "Assign" Box

7 "User or Team"

8 "Assign"





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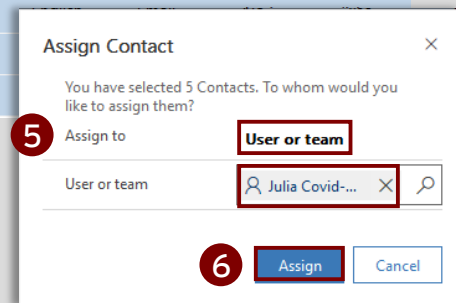
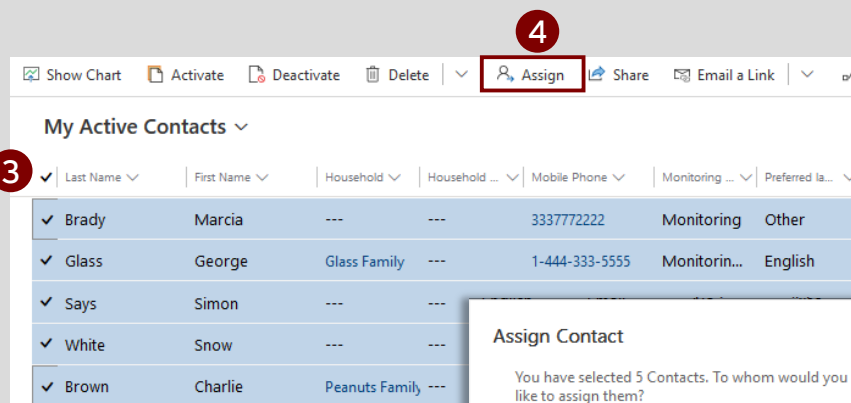
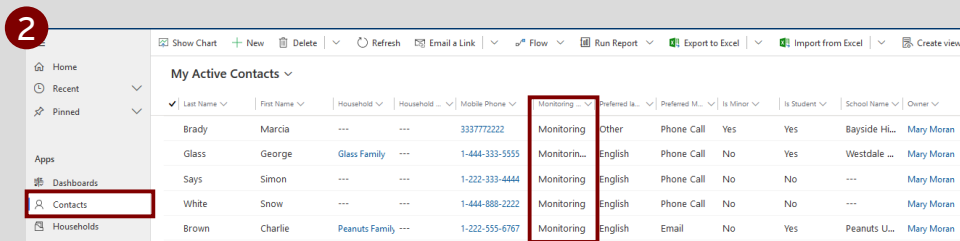
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Option 2: Reassign Contacts

This is often the preferred option for contact tracers who will be out of office for a longer period of time (>5 days). Always check with your supervisor to determine your local processes.

1. **Complete all steps (#1-8) in Option 1 to connect with your supervisor, identify a substitute, and reassign upcoming tasks and phone calls for the contact(s) in question.** These will not reassign automatically when you reassign a contact, so you must complete these steps to transfer outstanding items to the substitute tracer's Activities Tab.
2. Navigate to the Contacts Tab. Review "My Active Contacts" and ensure you have properly updated any monitoring status changes.
3. Select the contacts to be reassigned using the checkmarks.
4. Click the "Assign" box.
5. Single click "Me" to produce the "User or Team" selection, and type the name of the assignee.
6. Click "Assign." These contacts will now be re-assigned to the contact tracer you have designated and will no longer appear in your "My Active Contacts" view.

Please note that when you return to work, contacts and activities will need to be reassigned to you following the same process on this page (steps #1-6).



- 1 Complete all steps in Option 1
- 2 Contacts Tab
- 3 Checkmarks
- 4 "User or Team"
- 5 "Assign" Box
- 6 "Assign"